



Session 4:

Express Strategic Planning “Priorities”

Presented by the amazing and inimitable

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The BFO ESP Framework

You Are Here!



Goals/Metrics

Brainstorming

Scoring

Priorities

Execute

What are we after?
What's the big picture?
What does success mean?

Opportunities &
Initiatives

Evaluate opportunities
against key criteria:
Time, Cost & Revenue

Make sense of the list:
Best Opportunity?
Least Time?
Least Expensive?

Execute based on
priority - evaluating
progress and plans
every 60-90 days

Strategic Vision

Strategic Plan

Strategic Thinking For Digital Success



Definitions - Scoring

Rubric:

- **Revenue** - What is the revenue potential for each tactic scored as: high, medium, or low.
- **Time** - The amount of time it will take to implement the tactic scored as: short, medium, or long.
- **Cost** - How much will it cost you to implement the tactic scored as: low (up-to \$25k), medium (\$25k - \$100k), or high (\$100k+)



Instructions - Priorities

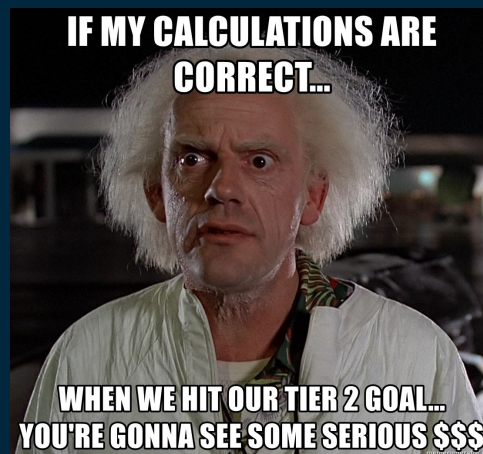
- Facilitator takes the scoring sheets from all participants and copy and pastes the answers into the “Opp Prioritization_Facilitator” tab for the corresponding participants.
- If using the BFO template, the totals should automatically propagate for you, otherwise you may have to use some excel wizardry.
- The final totals will magically appear (if using the BFO template) in the summary tab.
- Sort the summary tab from largest to smallest value for the scores.
- Badda bing, badda bang, you did it! You now have a prioritized list of the activities your team should focus on.
- Review one final time with your team and make adjustments depending on feedback.

Summary - Goals!

S	SPECIFIC	<ul style="list-style-type: none"> What do I want to accomplish? Why do I want to accomplish this? What are the requirements? What are the constraints?
M	MEASURABLE	<ul style="list-style-type: none"> How will I measure my progress? How will I know when the goal is accomplished?
A	ACHIEVABLE	<ul style="list-style-type: none"> How can the goal be accomplished? What are the logical steps I should take?
R	RELEVANT	<ul style="list-style-type: none"> Is this a realistic goal? Is this right time? Do I have the necessary resources to accomplish the goal? Is the goal in-line with my long-term objectives?
T	TIME-BOUND	<ul style="list-style-type: none"> How long will it take to accomplish the goal? When is the completion of this goal due? When am I going to work on this goal?

KEYS

- Measurement Makes it Specific
- Without Time, Goals Don't Exist
- Don't Be Crazy (unless you have to be)



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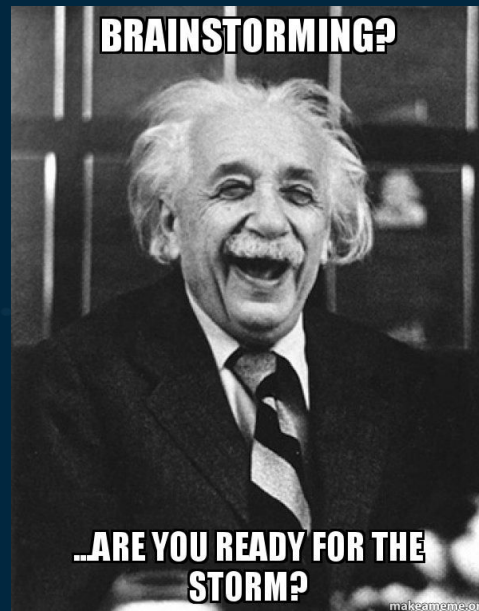


Summary - Brains!

- Choose Remote or In-Person
- A Good Facilitator is Key
- Choose Tools
- Define Rules
- Get After It!

- Mural Link:

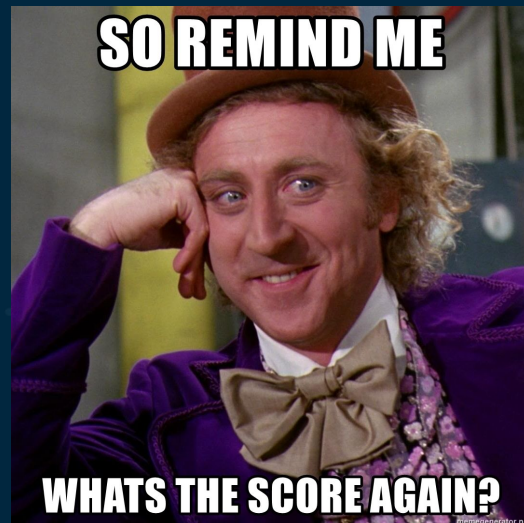
<https://app.mural.co/t/bfoesp4760/m/bfoesp4760/1641836325241/a0bea881b8473089a17ee881619deceab2069058?sender=u03391f72301be190cc954528>





Summary - Scores!

- Group Ideas
- Review Scoring Definitions
- Each Person Scores
- Facilitator Collects the Scores
-
- Scoring Sheet:
<https://docs.google.com/spreadsheets/d/1ZQcrIENWd-xIIgs5mBxgCBNsj0GiEV64nJTlcXOAOIE/edit?usp=sharing>





Summary - Prioritize!

- Facilitator Organizes Scores
 - Scores are Calculated
 - Results are Sorted by Score
 - Boom! You've Done It!
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- Prioritization Sheet:
<https://docs.google.com/spreadsheets/d/1R4d0tPPmkYPWxaUhZh7yt0S5UF2jzR2s8u2GYsfW1TY/edit?usp=sharing>





THANKS, HAPPY “STRATTING”

Many thanks to the great folks who threw questions our way!!

- Abigail S.
- Max T.
- John P.
- Pete D.
- Susan A.
- Marty M.
- Doc B.
- Albert E.
- Willie W.
- Oprah W.

Others?? Please reach out: webinar@befoundonline.com

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